DOCUMENT RESUME

ED 363 490 RC 019 383

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TITLE School District Reorganization in Illinois: Improving Educational Opportunities for Students.
PUB DATE Oct 93
NOTE 40p.; Paper presented at the Annual Conference of the National Rural Education Association (85th, Burlington, VT, October 14-17, 1993).
PUB TYPE Speeches/Conference Papers (150) -- Reports - Research/Technical (143) -- Information Analyses (070)

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Case Studies; *Educational Opportunities; Elementary Secondary Education; Financial Support; Incentives; Rural Education; *Rural Schools; *School District Reorganization; School Districts; *School District Size; School Size; State Aid; *State School District Relationship
IDENTIFIERS *Illinois

ABSTRACT

This paper examines recent school district consolidation in Illinois. A literature review summarizes: (1) evidence that led the state of Illinois to offer financial incentives for school and school district consolidation; (2) research on strengths and weaknesses of large and small schools and large and small school districts; and (3) attitudes toward consolidation expressed by state departments of education in Minnesota, Iowa, Missouri, Kentucky, Indiana, and Michigan. In Illinois, state financial incentives are pushing small rural districts to reorganize. Extensive on-site interviews were conducted with administrators, board members, teachers, and patrons in nine school districts that have reorganized since 1983. Case studies of five of these districts are presented in detail. Preliminary results suggest that the advantages of reorganization/consolidation greatly outweigh the disadvantages. Reorganized districts have provided students with a broader curriculum; teachers with increased salaries, benefits, and opportunities to focus on fields of interest; and taxpayers with a more efficient school system. Some students have experienced a modest increase in travel time. Nevertheless, reorganization alone is not the solution to current school finance problems. When reorganized districts have spent their incentive funds, they will find themselves in the same financial difficulties as other Illinois districts. The state must provide the organization and fiscal capacity to support educational opportunities for every child in Illinois. (SV)

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ED 363 490

School District Reorganization In Illinois: Improving Educational Opportunities for Students

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NREA Annual Conference
Burlington Vermont
October 1993

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SCHOOL DISTRICT REORGANIZATION IN ILLINOIS

The researchers had two different points of view and there was an opportunity to resolve their differences of opinion and learn more about rural districts, which were of an abiding interest to both since they both attended schools in rural communities in Illinois and Iowa. One researcher was interested in curriculum comparisons and the other researcher was interested in the financial costs and benefits. It was a partnership endeavor, and the study promised to have an objectivity borne of the creative disagreement over rural schools and the effects of consolidation.

Rather than the typical mile-wide inch-deep approach that statistical research in education normally takes, individual school districts were examined in depth. In the report that follows the reader will find a review of the literature, policy data from surrounding states, and profiles of four rural consolidated school districts. The research includes a comparison of curricular offerings and financial information, interviews with board members, administrators, teachers and parents and is rich in anecdotal information.

If a conclusion were going to be reached about the findings of this study, an accord over a definition, of education, had to be agreed upon first. There was no disagreement over this definition: public education through the twelfth grade must help young people develop to their fullest potential. Furthermore, it must be achieved in schools where students and staff know each other well, work together well, and assist in each other's academic and social development. There is a tendency to define education within the context of one's own experience which is what we gave in to somewhat. There was agreement over the "fullest realization of potential", and "preparing people in an ideal environment."

Principles

In discussion, we debated set of principles by which the effects of consolidation could be deemed advantageous, or disadvantageous, or neutral. There was an advocate for a full range of curricular and co-curricular activities; the other position did not value that principle as highly. Both believed that unless the existing educational program could be improved or sustained there was no point to consolidating. It was agreed that advantages should extend to staff, parents, and taxpayers. For example, one of the boards of education studied, resisted consolidation because there was a strong feeling that what they had and could provide for their students was good enough. Their collective experiences had affirmed this, and as they discussed the possibility of consolidation they became even more convinced. When, in their deliberations, they visited the other high school and saw the building's instructional equipment and furnishings, and visualized the educational activities that would be available for their students and staff, they changed their minds. Certain values they held for their students and their small high school changed and when it appeared that the burden on the taxpayers would be lighter, they pushed for consolidation. The effects of consolidation are personal as well as educational and it is difficult to reach conclusions about principles and advantages and disadvantages because, with the passage of time, experience and knowledge change.

With regard to optimal size, it was suggested that a unit district -- grade levels kindergarten through twelfth -- should enroll twelve hundred to two thousand students. At least one hundred students per grade would provide flexible student grouping, Approximately four teachers per grade can specialize in appropriate subjects and methodologies. There is the potential for diminished isolation and enhanced collaboration. An instructional support staff and

more equipment would be possible and both might be utilized more effectively with the larger student population. The potential also exists for a broader curriculum at the middle school and high school levels, true of co-curricular activities too. And, the principle of competitiveness benefits both the students and the staff.

Illinois School Districts

There are 942 separate school districts in Illinois as illustrated by Table 1.

Table 1

School Districts in Illinois

Enrollment by District Type

Enrollment	<500	500-999	1000-2999	3000-5999	6000-11999	12000+
District Type						
Elementary (K-8)	182	78	118	25	5	1
High School (9-12)	29	24	36	16	5	0
Unit (K-12)	104	133	132	28	16	1 0
Total	315	235	286	69	26	11

Source: Illinois Teacher Salary Schedule Survey, 1991-92, Illinois State Board of Education Springfield, Illinois

Unlike most states, Illinois school districts can be either kindergarten through twelfth, i.e. unit districts, kindergarten through eighth, elementary, or ninth through twelfth, high school. The later two fall into the dual district category instead of unit district denotation. For financial reporting purposes, Illinois districts are very much like the rest of the nation because a version of Handbook II Revised account code classifications is used. A dissertation study underway at Illinois State University examined the costs of certain functional categories for the three different

districts for among other factors size as measured by enrollment. Because of the size dimension some of the data from the study can be reported here to shed some additional light on the economy-of-scale objective which plays an important role in consolidation deliberations. The dissertation research examined four broad categories of expenditures in relation to total expenditures for the three types of Illinois school districts in size categories and wealth categories (Wealth was measured by equalized assessed property value per student unit). The results showed no significant differences for instructional expenditures regardless of type of district, size, or wealth. In other words, in Illinois it does not seem to matter how big a district is it will spend about the same amount on instruction per student in relation to all expenditures regardless of the size of the district. The same was true with regard to tax base--property wealth.

Similarly, the same relative amounts were spent on school administration and central administration per student in relation to total expenditures regardless of size or wealth. It was only in the pupil support function where differences were apparent. Pupil support includes counselors, social workers, health, attendance, principal, and other services that support the instructional programs. For that expenditure category unit districts in the 1,000 to 3,000 student range spent more per student. Elementary districts in the less than 1,000 student category spent more. And high school districts too in the less than 1,000 student category spent more on support services. Among all three types of districts the differences occurred in the wealthier ranges too, and the interaction was probably dominated by the wealth variable, not the size variable. The question that is unresolved is whether the expenditure differences were just possible or desirable. Whatever the true reasons might be, district to district, intuitively the smaller and wealthier districts spend more in support of instruction than do smaller poorer

districts.

The irony in small school consolidation is evident in the aforementioned research. Also in the policy in the state of Illinois. The state is promulgating two very different initiatives. It is trying to encourage consolidation with lucrative incentives and at the same time it is breaking up the largest district in the state by empowering the individual schools in the district so they can run their own instructional program without interference from the central administration. "As researchers began to take into account total cost and socioeconomic status of pupils, and to include measures of output such as achievement, pupil self-image, and success in college, economies of scale evaporated at relatively low numbers of pupils. The disadvantages of large size became readily apparent."(Swanson and King, p. 274) School district mergers provide the opportunity for economies of scale when the economy is measured as unit costs--cost per student, for example--as the number of students increases. Actually, it is not that simple. Educational costs are largely fixed costs. It costs so much to open a building for ten students as thirty; almost as much for 500 as a thousand. The only significant costs that vary are the teacher costs for salary and benefits. Class sizes for the most part start out at some norm, negotiate or otherwise, and may increase slightly and might accommodate many more students if the teaching staff is already forty, fifty teachers and more. The fiscal projections supporting mergers lack accuracy. Stat e revenues are always changing, property tax bases change too, and the willingness of taxpayers to support educational programs is not something to count on, neither is the inclination of the school staff to achieve the efficiencies that are logically projected. The people charged with overseeing consolidation efforts by school districts have found efficiencies in transportation routing, purchasing, the utilization of the buildings, and in administration and non-certificated

support personnel. They found too that in school districts of less than 493 students showed lower achievement despite lower pupil teacher ratios. The state authorities concluded that increasing class size does achieve economies without affecting performance.

Literature Review

Reorganization has been the focus of numerous studies throughout the United States. A common theme in the literature has been the "strengths of rural schools." Stephens (1986) lists several commonly accepted attributes of small schools: smaller classes, individual attention by teachers, low drop-out rates, the opportunity to develop student leadership skills, strong family and community support, and good parental interaction (p. 17).

Monk and Haller (1986) in a study of rural New York schools, on the other hand, report that substantial problems exist in small schools and these problems significantly disadvantage students who attend them. At the same time, Monk and Haller report that small districts provide important educational advantages to pupils and to the communities they serve. The weaknesses identified by Monk and Haller include:

> Limited Curricula;
> Scheduling difficulties that further limit programs;
> Shortage of teachers in some subject areas;
> Faculty have heavy and non-specialized teaching loads; and
> Educational aspirations of the students and community tend to be low.

The strengths identified by Monk and Haller include:

> Schools are the focal point of the community;
> Schools are devoid of discipline problems evident in large urban districts;
> Students learn the "basics" as well as other students and sometimes better; and
>
> Schools provide opportunities to develop leadership potential and non-academic skills (p. 2).

Monk and Haller noted that some problems appear in only the very smallest of schools (i.e.,

those schools with fewer than 100 students per grade level). It should be noted that Illinois currently has at least 299 school districts that enroll fewer than 100 students per grade level (Table 1).

Regarding school size, Webb (1977) states:

> Studies relating to effective and desirable sizes of school districts indicate that school district size is not an absolute, that the "optimum size" will vary from state to state and that size is but one of many factors related to educational quality and operational efficiency. (p. 365)

It is obvious that in sparsely populated regions of the state, there will of necessity be rural schools with low enrollments. It is also true that some small rural schools have attracted a very competent teaching staff. To focus on school size alone as being indicative of "good" schools would be a mistake instead, the focus needs to be on student success and student access to quality education.

Monk and Haller (1986) also noted that students in small rural schools, who do not relate well to a teacher, have no other choices. Similarly, many students are pressured into participating in extra-curricular activities in which they have no interest or may not have the physical abilities needed. Additionally, students are unable to avoid incompetent teachers. According to Monk and Haller, while small schools give teachers the opportunity to know their students better, this also provides increased opportunities for harmful mistakes by teachers (p. 12)

Hughes (1990) studied the 100 smallest schools in Wisconsin from May 1987 through October 1988. The study identified the same small school attributes and disadvantages as Monk, Haller and Stephens. Hughes stated that the following advantages selected from the study are verified in the literature: broader student participation, close personal relationships, student leadership opportunities, community support, better school climate and student attitudes, fewer

discipline problems and greater flexibility (p. 3).

The constraints identified by Hughes are: limited administrative and supervisory personnel, too few teachers, lack of cultural diversity, limited offerings for students, difficulty in recruiting and keeping staff, restricted facilities and higher per pupil costs (pp. 4-5). Hughes did not show that small schools had higher test scores or that small school graduates had a higher rate of college completion (p. 5).

A recurring problem for small rural schools, as identified by Monk, Haller, Stephens and Hughes is attracting and retaining competent staff. One contributing factor could be salaries paid to beginning and veteran teachers in small rural schools. In a survey of school administrators in Illinois, Hall and Smith-Dickson (1991) found that 122 of 499 reporting districts believed their salary schedules were not competitive and hindered recruitment of qualified teachers (p. 20).

Sher (1986) was commissioned by the North Carolina School Board Association to critique a 1986 report by the State Board of Public Instruction that called for larger school districts. In his analysis of the report, Sher concluded that there is no solid basis for believing that wholesale elimination of school districts would improve educational opportunities and stated that reorganization should be strictly voluntary (p. 9). In his report, Sher made the following five points.

> 1. Merger decisions are too complex and far-reaching in their impact to be made any way other than a case-by-case basis;
>
> 2. Good schools and school districts come in all shapes and sizes (as do poor ones) and therefore, educational policies which place too much reliance on any rigid size and organizational criteria are likely to be counterproductive;

3. Since directly mandating across-the-board mergers will not advance any compelling state interest, the state should discontinue all backdoor approaches to the same end;

4. There are a variety of alternatives to consolidation that can expand educational opportunities and enhance cost-effectiveness without abolishing existing units; and

5. Most important, organizational issues such as merger are rarely the key to enhancing the quality and efficiency of public education. Occasionally, making schools and school districts larger is helpful, but more often it is merely a diversion from the greater task of finding new ways to positively influence the lives of children and to increase the effectiveness of those who work in their service. (pp.9-10)

Reorganization in Surrounding States

In Spring 1992, the Iowa State Superintendent stated that if Iowa wished to have "World Class Schools," then the present organizational structure of 438 separate school systems must be radically altered. In August 1992, the Legislative Division of Post Audit in Kansas prepared a report that summarized options for consolidating Kansas School Districts. The report stated that if Kansas had been equal to the national median in terms of school district enrollments (2,883 students nationally compared to 1,317 in Kansas) the Kansas schools would have had the following: 2.6 more students per class; 4,200 fewer teachers; 370 fewer schools; and would have spent $127 million less to operate the school system. The report noted that school district enrollment is a major factor influencing all expenditures and that substantial saving will result only when schools are closed, class sizes are increased and the number of teachers is reduced.

To determine the extent to which reorganization is an issue in states adjacent to Illinois, researchers at the Illinois Institute for Rural Affairs conducted a telephone survey of State Departments of Education in Minnesota, Iowa, Missouri, Kentucky, Indiana and Michigan. Officials in each state agency responded to questions concerning reorganization in their state.

A brief summary of the responses follows.

Minnesota

Minnesota currently has 411 school districts and reorganization is viewed as an issue. Minnesota passed cooperation-combination legislation in 1989 that offers direct revenue compensation and optional levies for school districts that reorganize. There were 430 school districts 20 years ago, and they estimate that the state will lose about 10 districts per year with the new legislation. The reorganization initiative is not mandatory and legislative leaders consider the issue too controversial. The reorganization legislation is not supported by the School Board Association, but the Rural Education Association has given some support to the issue. Mandatory reorganization legislation was brought up in 1990 but dropped because of a lack of support. The tradition of strong local control in Minnesota will effectively block any mandatory legislation for the foreseeable future.

Iowa

The state of Iowa has 418 school districts, and the State Superintendent of Schools has suggested publicly that Iowa would be well-served by a total of 125 districts. Iowa currently has financial incentives in place to encourage reorganization, but these will end with the 1992-93 school year. The state has had a drop from 438 school districts in 1985 to the current 418, but more significantly, the state currently operates high schools in only 362 districts. This has been brought about by whole-grade sharing. For the school year 1993-94, there currently are 31 districts that have voted to reorganize, and 14 reorganization elections are pending. As in many other states, there has not been a legislative "push" for reorganization, and the schools choosing to reorganize are doing so by choice. As in Minnesota, reorganization is considered a "local"

decision, and schools can choose not to reorganize. It should be noted that Iowa did dissolve one school district that was not performing to standards and refused efforts to improve.

Missouri

Missouri currently has 537 school districts, and the issue of reorganization is not perceived as a problem by state officials. However, under legislation passed in 1991, the State Board of Education was given the authority to annex districts. As in other states, politicians avoid using the words reorganization and consolidation and so does the public. Privately, people recognize the need for a change in the organizational structure of Missouri schools. There has been no noticeable effort to reorganize schools since the 1950s. The same reasons advanced for reluctance to reorganize in Iowa and Minnesota are given for blocking reforms in Missouri -- local allegiance and strong support of local control.

Kentucky

There are currently only 176 school districts in Kentucky, but reorganization is considered the leading issue in Kentucky education. The person interviewed also considered reorganization as the leading national priority. It should be noted that in Kentucky the emphasis has been on how schools operate (i.e., site-based decision making). Kentucky has a system of rewards and sanctions in place. Schools that succeed in raising standards are rewarded, and schools falling behind receive sanctions. Kentucky's approach differs in that the emphasis has focused on administrative restructuring and moving decision-making responsibilities to the building level. Kentucky now has a decentralized, school-based structure, and this process has mostly affected high schools. This push to reorganize education in Kentucky through site-based decision making has encountered reluctance to take responsibility on the part of teachers.

Indiana

The state of Indiana currently operates 296 school districts, and reorganization is considered a major issue. The term restructuring has the same connotation as in Kentucky (i.e., decentralizing school leadership [site-based decision making]) and there is a push for a more organized curriculum. Consolidation is not an issue, but the number of districts has dropped from 304 to 296. The last legislation concerning consolidation was in 1959. Business and industry have pushed for restructuring in the Indiana schools. There is an apparent movement to examine the advantages of smaller schools prompted by local concerns. A person interviewed said there is a philosophical "battle" of small versus large districts.

Michigan

With 558 school districts, Michigan officials encourage reorganization but do not consider it a major issue. What the state does encourage are larger schools in grades 6 through 12. Michigan offers financial incentives to encourage reorganization, and they pay schools $850 per student in the first year of reorganization, $600 the second year and $350 the third year. While they have not passed legislation since 1964 to encourage consolidation, they emphasize quality programs K - 12. State officials, like those in the other states surveyed, cite community feelings as the reason why more effort to consolidate schools is not forthcoming.

It is clear that reorganization is an issue in several states, but legislators are reluctant to address the issue because of local resistance and a tradition of local control.

Illinois

Illinois with 938 school districts has the most comprehensive fiscal incentives for reorganization. A list of the incentives offered in Illinois includes:

1. If, in its first year of existence, the new district qualifies for less state aid than would have been available that same year to the previously existing districts, a supplemental payment equal to the difference will be made for the first three years.

2. In the first year only, a supplementary state aid payment will be made equal to the combined deficits of the previously existing districts. If the sum of the fund balances in all districts is positive, no payment will be made.

3. For any consolidation, the state will pay, for three years, an amount equal to the differences in salaries earned in the year prior to the formation of the new district and the salaries of employees in the new district (the state pays the increase to place all employees on the best salary schedule).

4. For each of the first three school years following the formation of the new district, the state will pay state aid equal to $4,000 for each certified employee employed full-time by the district.

It is clear that Illinois has more financial incentives for schools to reorganize. It appears that the financial incentives offered by Illinois beginning in 1985 may have had some effect. Since 1981, a total of 64 consolidations and annexations have occurred; 53 of these have been since 1987. This has resulted in 99 districts being dissolved/deactivated and 30 new districts being formed. Since 1981, there are 25 fewer unit districts (K-12), 29 fewer elementary districts and 15 fewer high schools.

Many barriers to reorganization (local opposition and the tradition of local control) found in surrounding states also exist in Illinois. Additionally, small school advocates claim the same advantages of small schools that have been mentioned by Monk, Haller and Stephens (i.e., small classes, low dropout rates, individual attention and the chance to develop leadership skills through participation).

Curricular Implications of Reorganization

The first step in moving toward a policy of equal education is to determine what constitutes an adequate education. To develop an adequacy model, the Illinois Task Force made several assumptions to find an amount that would support an adequate education for all students. To do that, assumptions were made about class size and certified and non-certified staff. In K-6, one full-time classroom teacher per 23 students, one Physical Education teacher per 250 students, and one art teacher per 500 students were assumed. In grades 7-8, they assumed a class size of 24 and a district administration ratio of 1 per 800 students, while in grades, 9-12 class sizes ranged from 21 for science to 60 for study hall. Given the size of many schools in Illinois, these ratios are inappropriate, since in many elementary and high school districts in the state, there are not enough students per grade level to reach these ratios. While the authors do not quarrel with the assumed ratios as desirable class sizes, the focus on defining what constitutes an adequate education should have been on educational opportunities for children.

It is clear that if schools are to be funded on a rational basis, there must first be agreement on what educational opportunities should be afforded **all students**. As Elwood P. Cubberly wrote in 1905"

> Theoretically, all children of the state are equally important and are entitled to the same advantages; practically, this can never be quite true. The duty of the state is to secure for all as high a minimum of good instruction as possible, but not to reduce all to the minimum; to equalize the advantage to all as nearly as can be done with the resources at hand. (1905, p.17)

The researchers underscore the need for increasing educational opportunities for children, particularly at the high school, through the process of reorganization. In studying twenty-two rural schools in a north-central Illinois county, the curricular disadvantages of small high schools

become very obvious. As an example, compare selected curricular offerings in Art, Business, English, Foreign Language, Mathematics and Vocational Education in two contiguous high school districts. District A is a high school of 700 students in the county seat, and District B is a high school of 40 students.

District A --Students	District B -- Students
Art	
Art 101	
Commercial Art I	Art I
Commercial Art II	Art II
Fine Art I	Art III
Fine Art II	Art IV
Business	
Computer Literacy/Keyboarding	Keyboarding I
Keyboarding, Typewriting and Formatting	Keyboarding II
Advanced Keyboarding, Typewriting and Formatting	Accounting I
Accounting I	
Business Law	
Business Math	
Foreign Language	
German I	Spanish I
German II	Spanish II
German III	
German IV	
Spanish I	
Spanish II	
Spanish III	
Spanish IV	
Latin I	

English

Basic English I	English I
Basic English II	English II
Basic English III	English III
Reading	English IV
English I	Lifeskills
English II	
English III	
English IV	
A.P English	
Media Communications	
Accelerated English I	

Mathematics

General Math	Algebra I
Vocational Math	Geometry
Business Math	Algebra II
Elementary Algebra A	Pre-Algebra I,II
Elementary Algebra B	Analysis
Algebra I	
Geometry	
Algebra II	
Trigonometry	
Analytic Geometry	
Pre-Calculus	

Vocational-Technical

Introduction to Technology
Drafting/CAD I
Drafting/CAD II
Orientation to Power Technology
Orientation to Construction Occup.
Auto Care & Maintenance
I.C.E. Program
Conservation

While a simple comparison of course offerings does not tell the whole story, it is obvious that students in District A have a wider variety of opportunities, particularly in vocational education, compared with the second district. Educational opportunities for students in small high schools are limited by their size. If you assume a pupil/teacher ratio of 10:1 (much lower than the Task

Force assumptions), a 50 student high school could only hire 5 professional staff with the resulting restrictions of course offerings.

That the Task Force did not adequately address the issue of school reorganization is evident in several dissenting opinions by task force members:

> What is badly needed is the courage to deal with the fact that Illinois has far too many school districts (each with its own superintendent, board, business manager, etc.) costing the public unnecessary resources and adversely affecting the education delivered to our children. The Task Force needed to deal boldly with that. It is time for reform (Ames, p. 16).

> The need to organize school districts into more educationally viable and financially sound entities is a critical component for any lasting solution to school finance and educational accountability ... To expedite the work of the Task Force, enabling legislation should call for it to use as its basic resource, the *"Opportunities for Excellence" - Findings, Conclusion and Recommendations of Illinois School District Organization, Final Report of the Committee on School Organization, Organization and Structure Task Force, Governor's Commission on the Schools - March 1973*. Much of the work conducted by that Task Force is just as valid today as it was in 1973 (Beckwith, p.17).

> As I look back on our discussion, it is obvious that we did not take advantage of an opportunity we had to address school size, especially as it relates to high schools. Before additional money is poured into small high schools, we should either demand consolidation or develop a plan for interactive electronic and video instruction if sparsity of students restricts the ability to consolidate (Farley, p. 21).

Not addressed in formal fashion in Illinois and other states are the advantages of consolidation as well as the disadvantages as viewed by those directly affected -- students, teachers, administrators and parents. Previous studies (Sher, 1986) have seemed to focus only on keeping small schools open. The current study involves nine school districts that have reorganized since 1983. We have conducted extensive on-site interviews with administrators, board members, teachers, and patrons of the districts in an effort to determine the advantages/disadvantages of reorganization. Additionally, this study has focused on the financial

aspects of reorganization to determine whether increased efficiencies in operations are being realized. Preliminary results are reported next.

Case Studies

Northwest

Northwest school district is located in northwest Illinois. It was formed on July 1, 1986 by combining the Lan and Shan school districts. Both districts had a central community, but are rural districts with most of their assessed valuation in agricultural land. Lan, with a population of 1,483, is the larger of the two communities, while Shan has a population of 938. Both districts had faced declining enrollments because of larger farms and a general migration from rural to suburban areas. Lan declined from 774 to 490 students, and Shan declined from 450 to 235. Further complicating matters was a troubled financial future for both districts. Farmland assessment in Illinois is not based upon sale value (ad valorem), but rather is based upon a complicated formula considering value of farm commodities, interest rates and soil type.

While Lan and Shan districts share some of the most valuable farmland in the county, farmland values throughout Illinois plummeted during the 1980s, and these districts were no exception. Assessed values in the Shan district declined from $19,000,000 in 1986 to $14,000,000 in 1992. Lan district was not as severely effected, but that is because a real estate development of vacation homes has dampened the impact of the farmland assessment decline. Consolidation of the two districts into one large district has had many effects. First, the new district has a much more stable assessed valuation base now than the two former districts did. Today's combined assessed valuation of $58 million is the same as the two separate districts were at the time of consolidation. But had they remained separate, the valuation in Shan would

have been $14 million and Lan would have been $44 million. Student enrollment (786) is large enough to continue a wide variety of courses. Note that this enrollment is only seven (7) students larger than the Lan district was at its peak. Had they remained separate, both districts would have had to severely curtail programs.

The new district has been able to expand the educational program offerings over what was offered by the Lan district at the time of consolidation. One of the major curriculum improvements cited by both administrators and teachers was to allow the junior high school program to be physically relocated from the high school building(s) in Lan and Shan and relocated to the old Shan High School. Junior High teachers were excited about the addition of classes such as home economics, shop, art and computer technology. This separation of junior high school age students from high school students gave the 7th and 8th graders a feeling of identity and was perceived to reduce discipline problems in grades 7 - 12. Furthermore, the reorganized district has installed a computer laboratory in the junior high school, added a children-at-risk program, increased academic expectations, reduced duplication and increased articulation through the adoption of grade specific (K -3, 4-6, etc.) attendance centers.

Interviews with teachers of elementary levels provides information on the curriculum aspects of the reorganization. One significant change was to expand the number of classes per grade level. Instead of one classroom for each grade, there are often three and occasionally four which benefits both students and teachers. The prevailing attitude of teachers was that the high school curriculum had been improved by either the addition of courses or enhancement of existing courses. As an example of curriculum improvement, in the smaller high school prior to the reorganization, certain courses were taught in alternating years (i.e., Physics and

Chemistry). With the reorganization and establishment of one high school, these classes are now taught every year. Enhancement of classes can be seen in the implementation of advanced English classes which are now available to students in this high school. An interview with teachers involved revealed an attitude that the changes have brought new vigor and vitality. As an example, there has been more science added in the agriculture curriculum offerings. A newly developed interest in the concepts of Tech Prep was expressed.

The faculty has become so well-integrated that old cliques have virtually disappeared. While a few teachers still have retained old district loyalties, these are rapidly disappearing. Part of the reason for the perceived low level of staff objection to the consolidation can be explained by the board's promise that no teachers would be eliminated during the reorganization. This pledge was kept. Reduction in force has been achieved through attrition. Further, the mixing of the staffs through the adoption of the grade centers, a single high school, and a single junior all high have assisted in the integration.

Teachers throughout this district attributed the successes which occurred during athletic events at the time of the initial consolidation with making the transition period more acceptable and positive for teachers, students, parents and the community. One anecdote which was reported was that a young female student thanked the crowd which had assembled at an athletic victory. She said she was very surprised and thrilled that these young women had been able to play together so well so fast. Her words were reported as being nearly therapeutic to everyone who heard her. Evidently that was the beginning of a healing process for many adults who heard her speak. Parent acceptance of the reorganization was also high. Attendance at parent-teacher conferences approaches 100 percent in grades K - 6. Attendance at concerts and performances

has been excellent. During the 1992 Christmas programs, administrators reported 1,300 attended the K - 5 program, 700 attended the Junior High program, and 300 attended the High School concert. Also, the new district has passed several tax rate increases and issued short-term bond instruments which were subject to referendum.

An area of greatest concern usually is the time students spend on school buses. Prior to the reorganization, students rode the bus for 45 minutes. After the reorganization, this increased to 60 minutes. However, the administration recognized this problem and adopted a split release time, allowing younger students to have a shorter school day and be delivered home before the junior/senior high school students are released. While this may be at odds with usual arguments for efficiency, it resolved the longer school day issue.

Some problems have arisen due to the reorganization. As an example, the Agriculture courses have had to be adapted to new demands on the available facilities and on agriculture faculty. A second problem was the cost of erasing signs of the old district and establishing an identity for the new district. Costs of new uniforms, relettering school buses, repainting gymnasiums and locker rooms, buying building signs, letterhead stationary, and generally erasing all signs of the two old districts amounted to $75,000 - $100,000.

Another problem was the emotional response of some residents. Students were reported to have been affected by the hostility experienced in their homes regarding the issues of this consolidation. These hostilities have lessened, but they remain particularly in the smaller district which closed its high school. Reasons given for negativism range from giving up school colors to loss of business in the smaller community.

Although this community had already begun to decline, as evidenced by the declining

school enrollments, some residents, nevertheless, felt strongly that the reorganization effort was to blame. This emotion was still alive and flourishing as it was repeatedly reported that the larger district only wanted the consolidation because "they were in such severe financial straits." The smaller community had been considered a somewhat "elite" community, and the consolidation was often blamed for persons with lower economic levels "moving into our area." One teacher reported that while some held this opinion for various reasons, others were "just complainers who have to gripe about something." While these popular perceptions were reported by several interviewees, the hard evidence indicated that these perceptions are not true. The real estate values in the smaller community have continued to increase. The mayor of Shan publicly stated that his was "the fastest growing community in the county." Other residents of the community interviewed indicated that the demise of businesses in the community was not a result of consolidation but the expansion of retail facilities in two regional shopping centers, one 25 miles away and the other 15 miles away). They reported that these factors were far more significant than reorganization of the schools. One other piece of evidence of community support is that the Bank of Shan donates $2,000 per year to the school district to provide four $500 scholarships to reward outstanding teaching. Teachers can use this money anyway they choose.

One faculty member related a recent negative incident which had occurred in the smaller district. A school staff member was overheard saying, "That would have never happened in this community before this darn consolidation. It just wouldn't have been allowed." This statement was indicative of an attitude apparent throughout various interview sessions. It was not, however, the predominant attitude observed by the researchers.

When asked about the possibility of future reorganization/consolidation, those teachers interviewed responded that it was a definite possibility. Many small districts were experiencing the same declining enrollments that existed prior to this consolidation. They expressed positive attitudes toward reorganization and even stated support to improve the quality of education for students. A perusal of the ACT scores of students in this district substantiated high academic standards for students. The high scores, as well as the colleges and universities being attended by recent graduates, reflect excellent educational achievement in this district. Teacher turnover is very low. This fact, as well as the obvious high standards, help explain the above-average accomplishments of this district.

River Bend

River Bend encompasses three small communities (populations 764, 525, and 649) in west-central Illinois. The Dodge Community Unit School District #319 (K - 12 enrollment of 236 students) was annexed to the existing River Bend Community Unit School District #337 (K - 12 enrollment of 452 students) by action of the Regional Board of School Trustees after a petition was filed by residents of the Dodge district. The annexation was bitterly opposed by the Dodge Board of Education, and it attempted to delay the action of the Regional Board through continued court appeals of the administrative action. The Board of Education of River Bend #337 was notified in June 1992 that annexation was imminent, but the action was not official until August 1992.

Assuming that the action would be official, the school board had to make many facility and curriculum decisions in a short period of time. First, it was decided that every attempt would be made to integrate existing staffs (Dodge had rehired its entire staff), utilize the existing

educational facility in Dodge, and provide program equity throughout the district. To accomplish equity, the facilities were reconfigured so that grades pre K - 3 would be housed in Dodge, 4 - 8 would be housed in Bowen, and 9 - 12 would be housed in Augusta. Prior to this reorganization, there had been elementary centers in all three communities and high schools in Augusta and Dodge. This change in utilization of the Dodge building required massive remodeling and equipping of the facility with an expenditure of $200,000.

The staff members were reassigned to the appropriate building, based upon area of teaching expertise and/or grade level. Since the Dodge curriculum/district was distinctly different from the River Bend curriculum, former Dodge teachers were assigned a mentor teacher from River Bend to assist them in ordering supplies, familiarize them with the facilities and procedures in the district, and assist them with the curriculum. Also, since River Bend teachers outnumbered Dodge teachers (approximately two to one), the smaller group was quickly integrated. Teachers previously employed by the Dodge district were consistently complimentary about the willingness of River Bend teachers to accept them as colleagues and their willingness to share expertise. To quote one teacher, "There was some controversy and divisiveness among the staff members before the decision to annex was approved. But once the decision was made, our only concern was making it work." A further comment was, "We were impressed with the high priority education had in the River Bend district. **Dodge had struggled to survive for so long that survival, not education, became the goal."**

When asked about the positive aspects of the merger, staff members reported that high school students had access to more course offerings and that the reorganization had permitted an enhanced extracurricular program for women. Elementary teachers reported that the grade center

reorganization would not have been likely without the need for reorganization caused by the addition of the Dodge building. They also reported that the grade center approach had brought increased vitality and excitement to the teachers. They felt that the quantity and quality of planning between teachers of the same grade levels had increased. The ex-Dodge teachers reported that the reorganization provided them access to a greater quantity and quality of teaching supplies and materials. When asked if the loss of the high school in Dodge had caused decreased property values, staff members from Dodge reported the exact opposite. They indicated that property values had increased because prospective residents now saw the educational system which existed as viable and of high quality. Also, when asked if they would support further reorganization between the new River Bend and neighboring districts, staff members expressed some reluctance, but indicated that they would certainly not oppose it.

When asked to identify negative aspects of the reorganization, staff members interviewed listed only two. First, the loss of the kindergarten graduation tradition in Dodge and second the reluctance of a **few** parents to accept the new district. However, when asked if any parents wanted to go back to the old boundaries and programs, the response was an emphatic no.

Tyler

In this small central Illinois town (population approximately 12,000), two small districts were annexed due to one's financial problems and the other's building being condemned. Students from the two smaller districts were transported into the middle school and the high school. Elementary schools were left in both of the smaller districts, but the communities may eventually be forced to abandon them in the future. This is a very emotional issue and dreaded by both of districts. Although students would not be required to ride buses for an extended period of time

because they are in such close proximity, these small communities are resistant to this possibility. Parents and community leaders expressed feelings that this would definitely not be in their best interests. They stated that smaller children should remain in their own communities, but it didn't seem to hurt the older children very much.

The Board of Education in Tyler, which consists of seven members, invited two members of each of the two smaller districts to serve as Advisory Board members until the next Board election in Fall 1993. This has worked well in making the transition more acceptable.

The Middle School in Tyler is being implemented in place of the former junior high school. This transition has been very helpful to the adjustment of those teachers who were transferred into the Tyler district. Interviews with teachers revealed that since the whole school was faced with implementation of the new middle school concepts, all teachers were involved in change not just those involved in the transfers. This had helped overcome the fears they had in not being familiar with a new operating system.

The Middle School is lead by a dynamic principal sensitive to the needs of her teachers and students. She has helped them through each step in implementing the middle school concepts with professional guidance and support. There are team meetings for planning and keeping close track of students. These teachers are involved with planning and implementing the curriculum required to meet the needs of middle school students. The climate of the school is extremely positive, and a spirit of cooperation was apparent at every level.

Interviews with teachers revealed positive attitudes by teachers who had transferred into the school from the smaller districts as well as the Tyler teachers. It was difficult to note curriculum changes which had occurred due to the annexation, because the entire curriculum had been

affected by the implementation of the middle school program. The most negative aspect reported was the fact that teachers had to share rooms at this time rather than having their own rooms as they had previously. Even this finding seemed to be taken in stride and was not reported to be an overwhelming hardship.

Interviews with students from all three districts substantiated the positive impact of the annexation. Students reported their initial fears had proven to be unfounded. The blending of students had been so comfortable that they had readily adjusted to changes. Some students reported their parents had expressed concerns that hadn't materialized. **Students from the smaller districts stated that the most positive aspects were having more students with whom to interact. They liked having more friends and more extra-curricular activities available.**

Interviews at the Tyler High School revealed a positive climate as well. The administrators stated that the biggest problem was lack of space and money. They had been forced to offer early-bird science classes because their science labs were inadequate for the number of students needing these classes. Class sizes had increased but were still not too large for effective teaching practices. Study halls were extremely large in some cases, however. The main impetus of the annexation had been financial. They were still waiting for promised state monies of approximately $800,000. They had increased expenditures amounting to about $13,000 for band uniforms and choir robes, as an example. The curriculum had been expanded to include new classes in German, Algebra III and Physical Science.

Teachers had been absorbed into the existing bargaining unit without problems. Because of the passing of a special retirement plan in Illinois, they were expected to lose teachers in the next three years. Teachers from all three districts were positive about this annexation. Teachers from

the smaller districts reported that Tyler teachers had made special efforts to make them feel accepted into the district. There had been an opening reception and other social events to welcome them.

Interviews with students revealed that students were relieved and surprised that the annexation was so smooth. The students from the smaller districts reported they had many fears coming into Tyler. They had thought the move would be traumatic but were pleasantly surprised to find their fears mostly unfounded. Some said they felt they had lost some of the closeness in their smaller schools. However, the increase in the number of students had provided them with many advantages such as more people like them, more curricular choices and more extra-curricular opportunities. They specifically mentioned that with more students, their class rankings would be advantageous when applying to colleges in the future. They also repeatedly mentioned the new clubs and sports activities from which they could now choose as being desirable to them.

Students reported that the concerns of their parents hadn't proven accurate as they adjusted to their larger school. All students expressed the feeling that the move had been ultimately beneficial to them personally. Students further stated that had this study been done earlier in the year, the findings might have been different because their attitudes towards the move had changed significantly in the past few months.

The seniors from one of the smaller districts reported having the most difficult adjustment as they still felt a sense of loss of their school. However, even they expressed a consensus that it had been a wise move. They stated that they did not, however, think their parents agreed with them about this issue.

Yale

Before it assumed a small continuous district, the Yale high school district enrollment in ninth through twelfth grade was seven hundred and after consolidation seven hundred and forty five. Enrollment in the smaller district made it difficult to sustain an accredited program, and when the state intimated that financial aid might be discontinued, citizens in its community pressed the board of education to consider consolidation. However, it took a trip by the board members to the larger building to see the educational advantages that were awaiting their students and staff before the decision was made.

Forty-five students did not make a impact on the larger high school. For the most part, the new students were already familiar with the larger school. Practically no change in transportation resulted from the consolidation because of the unique geography of the two districts. Because of the larger facility, the new students were able to enroll in much better science and technology programs. Athletics and music programs improved because of the addition of the new students' skills. Financial conditions improved and have remained good and because of the financial incentives to school districts the taxpayers have avoided increases in taxes. The board president of the smaller district said in the interview that the district was anticipating a substantial tax increase to bring their program back to where it was before the cuts that were made to sustain the school.

The smaller district had been sharing a teacher with the larger district and sending its students to the larger district for some courses. The smaller school had not had a fulltime mathematics teacher for some time. Students did experience some unnecessary difficulty because of parent opposition but everyone now agrees they are better off in all ways because of the action

by the two boards of education.

The impact on tenured teachers and principals was minimal because of the paternalistic policy of the Yale district. Two teachers had difficulty adjusting to the larger classes and larger building. The impact on support staff was harsh at first but in the long run there were better off too because of the jobs they took in the communities. Taxes went down because of the consolidation and the loss of local control that every taxpayer feared never was a problem. Several other small districts around them will have to consolidate because the school buildings have become too expensive to maintain.

Gifted students were being handicapped educationally according to this board president and the lack of adequate school programs not only cheats them it cheats society. He said other students were affected by the lack of competition, that competition is beneficial, among other things it lessens the shock of college. A teacher from the smaller school had less definite feelings about the benefits of merger. For example, he liked having a student for four years. He now teaches only the first two years of his subject and sees his students for half of the time he used to and is not able to develop the friendships he was able to. His pay and benefits have improved significantly, but professional relationships are difficult because "he is the teacher from the consolidation." He enjoyed teaching in the small school but he said the students were better off in the larger high school. They still get the nurturing he and the other teachers provided but they now receive it from a variety of sources.

The superintendent in the Yale district allowed us to ask some potentially embarrassing questions about his plans then, and his decisions over the consolidation. There was no real conception of the additional costs his district might have incurred. Costs are not generally

heeded in education and they are not issues in consolidations. He stated that his operating expenditures went up as a result of the consolidation. When he was asked if they went up $274,410 (45 students times $6098 per student) he indicated not. Adding 45 students to a school population of 700 would not increase costs proportionally for each previous student. There was new revenue--the incentive money and general state aid and taxes--which offset the additional costs. Textbooks might have been purchased but he was not sure whether that was necessary or whether they were already on hand. No furniture was needed, and the only equipment cost might have been additional wear and tear on the computers. Driver education spilled over into the following summer term but summer programs are largely self supporting by fees and state reimbursement. The food service program workload increased, but in the high school is not a costly service. Maintenance and supply costs went up. The building is well maintained and any additional abuse would have been attended to immediately. The addition of 45 students caused some parking problems.

In future consolidations the superintendent is going to pay particular attention to the burden on the administrative and support staff because of the strain that is now evident on the district's counselors and building administrators, the secretaries, special education teachers and aides. The additional strain was due to the changing conditions in the school not simply the addition of students.

Savana

Another district in the consolidation study differed in may ways from the Yale district. The Savana district is a unit district kindergarten through twelfth grade. It enrolls 2,100 students, a result of the consolidation of four separate school districts. While Yale district had taken in

relatively small number of students who were already a part of the larger community where they socialized, shopped, etc. The Savana district was the voluntary consolidation of four districts. The Savana district was given $1,460,000 in incentives, $760,000 to wipe out the debt and the rest in state aid and salary incentives. The consolidation costs were between $100,000 and $125,000.

Program reductions and financial problems in the four districts had resulted in some teachers teaching outside their field. This brought into question the quality of the academic program. One of the districts was on the State's financial watch list which meant that the district was consistently spending more than it received. Another district was going to have to pass a referendum or it too would have been on the watch list. One district had passed a tax rate increase but it would only put off temporarily the financial problems it was continually experiencing. The main factor that was contributing to the financial and programmatic problems of the districts was the decline in farm land value. The State had devised a new form of valuation that was based on acreage productivity, soil quality and an interest. The yearly drops in value were consistently ten percent and the Savana district's tax base had reached a level that no longer sustained the educational program.

With the merger the districts were able to consolidate financial resources and support an academic program that everyone agreed was more extensive, with more courses in vocational programs, science, social studies, computer science, and math. There were additional athletic opportunities for girls and boys and the same was true for music.

In sports, freshmen compete against freshmen, sophomores against sophomores, which was impossible before because of the small numbers of students or either gender within classes

participating in athletics. There is now more breadth and depth to the programs and content has increased, both primarily because of numbers of students and their diversity. Pride in program and extra curricular activities has been building every year since the merger according to the superintendent. Older teachers expect more and more from students and the districts resources. Open, disciplined environments are maintained now because the staff has found that it was possible and likes it that way.

During the consolidation the administrators met with all of the employees individually, in their own settings, to seek information. Ultimately, the course structures were decided by the administrators to guard against the self-preserving instincts that might have hampered the program development. There were, however, significant changes in course content as a result of the teachers.

The academic reputation of the Savana district enhanced property values in the area and improved business. Several people said that the smaller communities would have atrophied and eventually disappeared had not the consolidation made the area a desirable place to live and raise children. The superintendent regretted only one promise that was made to the communities which was that a kindergarten through sixth grade building would be left in each of the communities. The promise should have been for an elementary school which would have given the administration the flexibility to put an Kindergarten through fourth grade building in a community where the enrollment justified it.

One of the parents said there were no drawbacks to the consolidation. The district is much better academically. Children have adjusted well, as have parents. In a recent meeting, only one parent wanted to go back to the way it was. The program has resulted in higher test scores. The

consolidation put off a tax increase for eight years, and the tax rate is lower than the surrounding districts. Bus rides for some students have been slightly longer. This is offset by the feeling of families that they are members of a larger, more secure community. It has been a win-win situation: more efficient school system with enriched programs, better equipped schools, and better teachers without spending more tax money. The parent said that her family had built a house two years ago and was told in a recent reassessment that because the house is now in the new Savana consolidated school district, it is worth $20,000 more than it cost her and her family to build.

Educational Costs

One of the superintendents who had been involved in successful annexation responded to several difficult questions about the administration of educational costs. His districts is made up of one relatively large high school in a rural area of the state. Surrounding his district, in one county, are more small school districts than anywhere else in the state. A neighboring district of seventy students dissolved so the students to attend the larger high school. There was a long period of debating the pros and cons of the action on both sides but eventually the smaller district board of education decided after seeing the kind of facility that it's students would attend took the action. The host district board of education had stipulated several principles that the superintendent had to adhere to before they authorized him to set the wheels in motion that allowed the seventy students in. Most of the stipulations were easily complied with, but the overriding requirement was the district could not incur any additional expense other than the additional teachers. The superintendent said he did not have a very good concept of the additional costs; he convinced the board that the state financial incentives for consolidation, and the

expanded tax base and revenue would more than offset any costs not already incurred.

During the interview, a few years after the merger of the two districts, the superintendent was hard pressed to some up with any of the ancillary costs. He cited the operating expenditures per pupil, which is an index that is derived by dividing total costs by total students, but he realized that was not representative necessarily of any additional costs due to annexation. Total costs were simply divided new number of students. He thought maybe textbook costs went up, if indeed they had purchased more but he thought that had not been necessary. He said they might have had to acquire more furniture. There was he was certain more wear and tear on the computers. Driver education spilled over into the summer but there it was self-supporting. The food service workload increased. Routine supplies and maintenance costs would have risen and there would have been and increase in the custodial workload. Continuing their strict attention to a clean, graffiti-free facility would probably have been slightly more costly.
And there were definitely parking problems as a result of seventy more commuting high school students.

With regard to future additions of students, the superintendent was adamant about the effect on the administrators, aides, counselors, secretaries, special education teachers, that a larger student population that was also more diverse would cause their workload to increase and they would need to add staff in those areas. There are standard student-loads for those positions, accrediting agencies use them, but staff members are largely unconcerned about those standard but they are acutely aware of the increase in work, and they are concerned about the students who might be in more jeopardy as a result of not receiving the kind of attention they require.

In any assessment of educational costs, whether it is for an upcoming annexation, or an

after the fact review of financial receipts and disbursements the investigator must sort out variable cost increases (or decreases) from fixed costs. And the research is not well developed, so studies like this become even more important because of the field orientation where what has happened and why can be discerned from the interviews and the collective wisdom of everyone involved in educational consolidations.

Summary

Current educational finance policy in Illinois is somewhat contradictory. While there is a push to reorganize the Chicago Public Schools into smaller, more manageable units, the State is not funding small rural schools to the extent that they are able to offer adequate educational programs. In effect, the State is pushing school districts to reorganize. The current financial incentives make it very difficult for small rural districts to continue their existence since the only way they can access additional State funds is to reorganize with one or more neighboring districts. The current upswing in the number of schools opting for reorganization was one of the factors that prompted this research project.

Preliminary data from the in-depth study of the five school districts has revealed that the advantages of reorganization/consolidation greatly outweigh the disadvantages. Examination of the districts has revealed that students have been afforded a better educational program, teachers have seen their salary and benefits increase and are able to concentrate on their fields of interest, and taxpayers have been spared further tax rate increases to support inefficient schools. Small town homeowners, in reorganized districts, have seen their equity increase since people are willing to locate in a school district that offers a viable educational program. Students have quickly adjusted to the new school and benefited from the increased educational opportunities

and competition. In reviewing the data accumulated to date, it is hard to find the disadvantages other than a modest increase in travel time for some students.

Meaningful reform of school finance in Illinois cannot be realized until the state addresses the key issue of school district reorganization. While Illinois simply can no longer afford the luxury of over 940 separate independent school districts, reorganization by itself, even with financial incentives, is not the solution to the current school finance problems. After the incentive money is spent, reorganized districts can find themselves in financial difficulties like all other districts in Illinois because of the lack of adequate financial support. The state must decide what educational opportunities must be afforded each child in Illinois and then ensure that the organization and fiscal capacity is there to support it. A child's education must not continue to be a function of where they live.

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